Chapter 31

Electronic Mandex

31-1. General.

a. Since deployment, you have identified improvements and functions that would make the application better fit the recruiting process. One of these improvements involved populating your scheduled appointments from the ARISS-RWS Leads-Reports application to your MS Outlook calendar. Through the previous chapters we identified the Send to Outlook box on the different screens. If the box is checked those scheduled appointments and completed actions will automatically be recorded on your MS Outlook calendar.

b. There are several ways to set up your calendar and how to use it. Do you set up your calendar on the server or on your laptop? Do you share your calendar and if so how do you do it? These questions are being addressed now and a decision will be forthcoming. Until then, the below steps will set up your calendar on your laptop. If someone wants to review your calendar, all you will need to do is print the calendar from your laptop. Once a decision is made, we will make the changes to this chapter and let everyone know if this is how we will do it or if you should set up your calendar differently.

c. There are three steps to establishing your MS Outlook calendar and keeping your calendar up-to-date.

   (1) Establish an MS Outlook account.

   (2) Set up of MS Outlook.

   (3) Printing your MS Outlook calendar.

d. You will need:

   (1) Your NT login ID and password.

   (2) Your ISP login ID and password.

   (3) Your PKI login ID and password.

31-2. Establish an MS Outlook account. Every recruiter and SC should have a by-name e-mail account established during their initial processing. If you do not know or do not have an e-mail account, you need to contact your Rctg Bn IMS immediately.

31-3. Set up of MS Outlook.
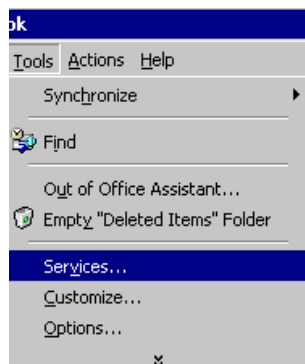
a. The first thing that needs to be checked is where your e-mail is being delivered. MS Outlook should be set up to deliver your mail to your Personal Folders. To see where your mail is being delivered, open **MS Outlook**. Once **MS Outlook** is opened, click on **Tools** from the menu bar and then click on **Services**.

b. The **Services** screen will appear showing what services are in your profile. You should see **Microsoft Exchange Server, Outlook Address Book, Personal Address Book,** and **Personal Folders**.

✔ If any of these are missing contact your Rctg Bn IMS for assistance.
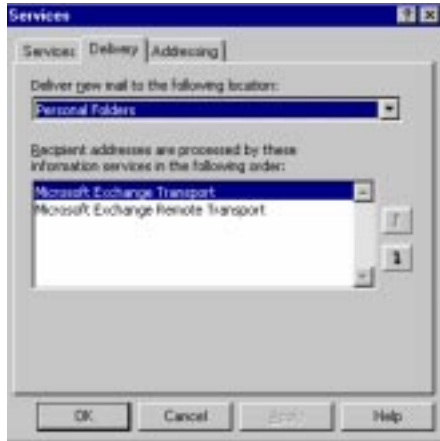
c. You need to click on the **Delivery** tab. The **Deliver new mail to the following location** field should show **Personal Folders**. If not, click on the drop-down arrow and select that folder. Now click **OK**.

✔ If you are seeing something different than what is shown here, you may need to contact your Rctg Bn IMS or recruiter trainer for further assistance.

d. Click again on **Tools** and then click on **Options**. When the **Options** screen opens, you will need to click on the **Mail Services** tab.
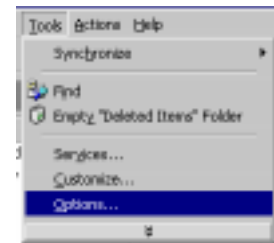
e. Make sure **Enable offline access** and **When online, synchronize all folders upon exiting** are checked and that **Microsoft Exchange Server** is checked under **Check for new mail on**. When finished, click **OK**.

✔ If your MS Outlook is already configured then there is nothing more that you need to do.   Close MS Outlook and open the ARISS-RWS Leads-Reports application and try out the new features in your Contact History.

f. Now that this is completed the only thing that you have left to do is connect to your e-mail and synchronize your MS Outlook folders. Close your **MS Outlook** and logon to the network. Do you remember how to get connected and logon? If you need help review chapter 3.

g. Once you are connected, open **MS Outlook**. Your calendar should look something like this. It all depends on what view you have set. You can click on **View** and click on the different selections to format the look that you want. If you review the example, you can see that there is a folder called **Mailbox** and below is **Personal Folders**. Your name should be next to the **Mailbox** folder. This is where your mail is held until you connect and check it. Any new mail will now be automatically delivered to your **Personal Folders Inbox**. Since you are here now, take a few minutes and go through any mail that you have in your **Mailbox** folders. You may want to move some files to your **Personal Folders** or delete any old messages. There is a re-striction on how big your Mailbox folder can be and by deleting old messages and moving the others to your **Personal Folders** you will never have a problem. Now that you are finished, close **MS Outloo**k and disconnect from the network.
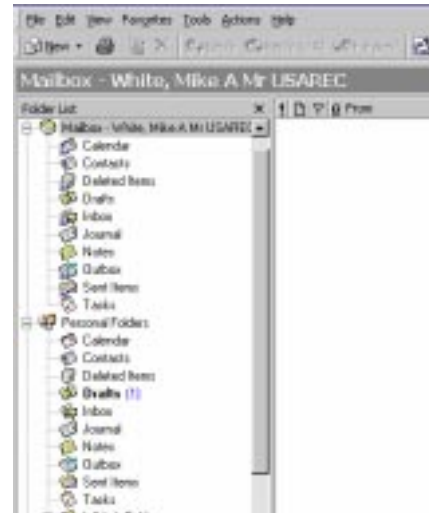
✔ Remember, once you have completed all your actions that require a connection to your ISP, you need to disconnect and disable your PERMIT/Client application and ISP connection. You only have so many hours per month, do not waste them being connected needlessly.

h. Now that your MS Outlook is set up correctly and your folders have been synchronized, all that is left is to open your ARISS-RWS Leads-Reports application and start saving those appointments that you are making. Review chapters 6, 13, 14, and 17 on how to save your Today Actions and Next Actions to your calendar in MS Outlook.

31-4. Printing your MS Outlook calendar.

a. Now that you are using your MS Outlook calendar there will be times when you need to make a copy for your files or your chain of command. To print the calendar is simple. Connect the printer to your laptop and open **MS Outlook**. Once MS Outlook opens, click on your **Calendar** under **Personal Folders**. Your calen-dar should appear. Depending on how you are viewing your calendar, you will see a **1 Day; 5 Work Week, 7 Week; or 1 Month** view. To print the calendar, click on the icon.
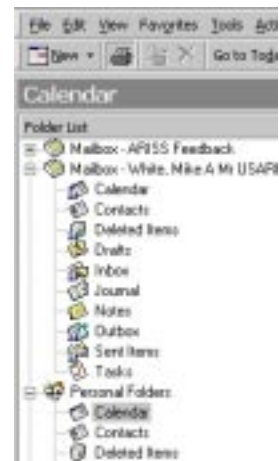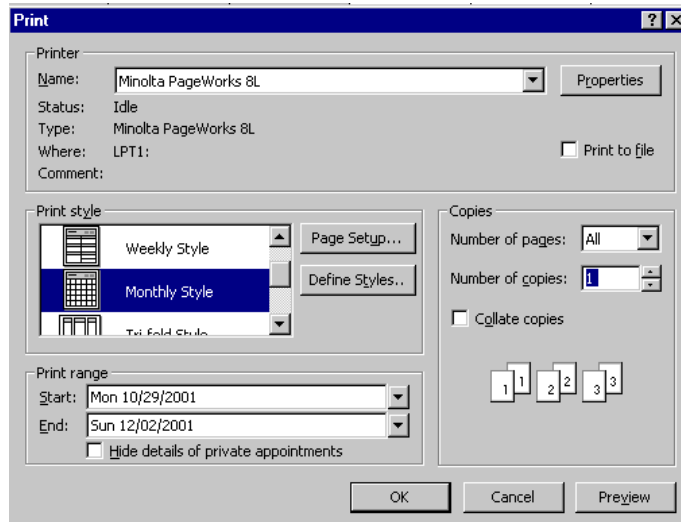
b. A separate screen will appear asking for you to identify the **Printer, Print style**, and **Print range**. Complete the necessary information and then click **OK**. Now you can give a copy to your SC, 1SG, or Rctg Co commander or just keep a copy for yourself

c. Once you are finished, close **MS Outlook** and go back out and prospect. This will be a great tool if you utilize it to its fullest potential. You will never miss an appointment and will have a quick reference to check on future appointments.